

OVERVIEW OF WINES OF BORDEAUX



ITS ARTISANS

Women and men, all of them passionate, young and old, château owners and hipsters, entrepreneurs and career changers, timeless and alternative, collective and independent... together they contribute to a more sustainable and equitable society, innovate, and bring their region to life.



5,000 winegrowers in the PDO.
Average size of estates: 20.5 hectares.



26 cooperative cellars and 4 unions, which represent 38% of PDO growers and 26% of production.



300 wine merchants who account for more than two-thirds of Bordeaux wine sales worldwide.



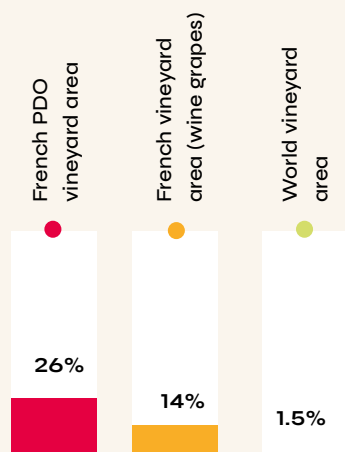
60,000 direct and indirect jobs generated by the sector.

ITS TERROIR

The Bordeaux vineyard covered **103,200** hectares of PDO vines in 2023. Nearly **4/5** farms in the Gironde have vines. There are **65** Protected Designations of Origin (PDOs).

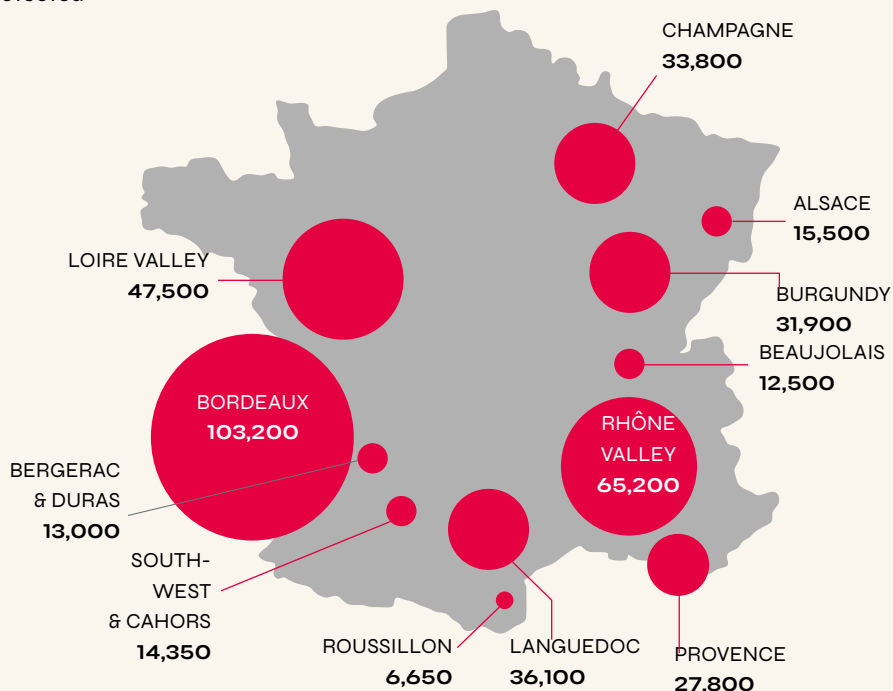
BORDEAUX BY VINEYARD AREA IN 2022

Sources: Customs, Agreste, OIV

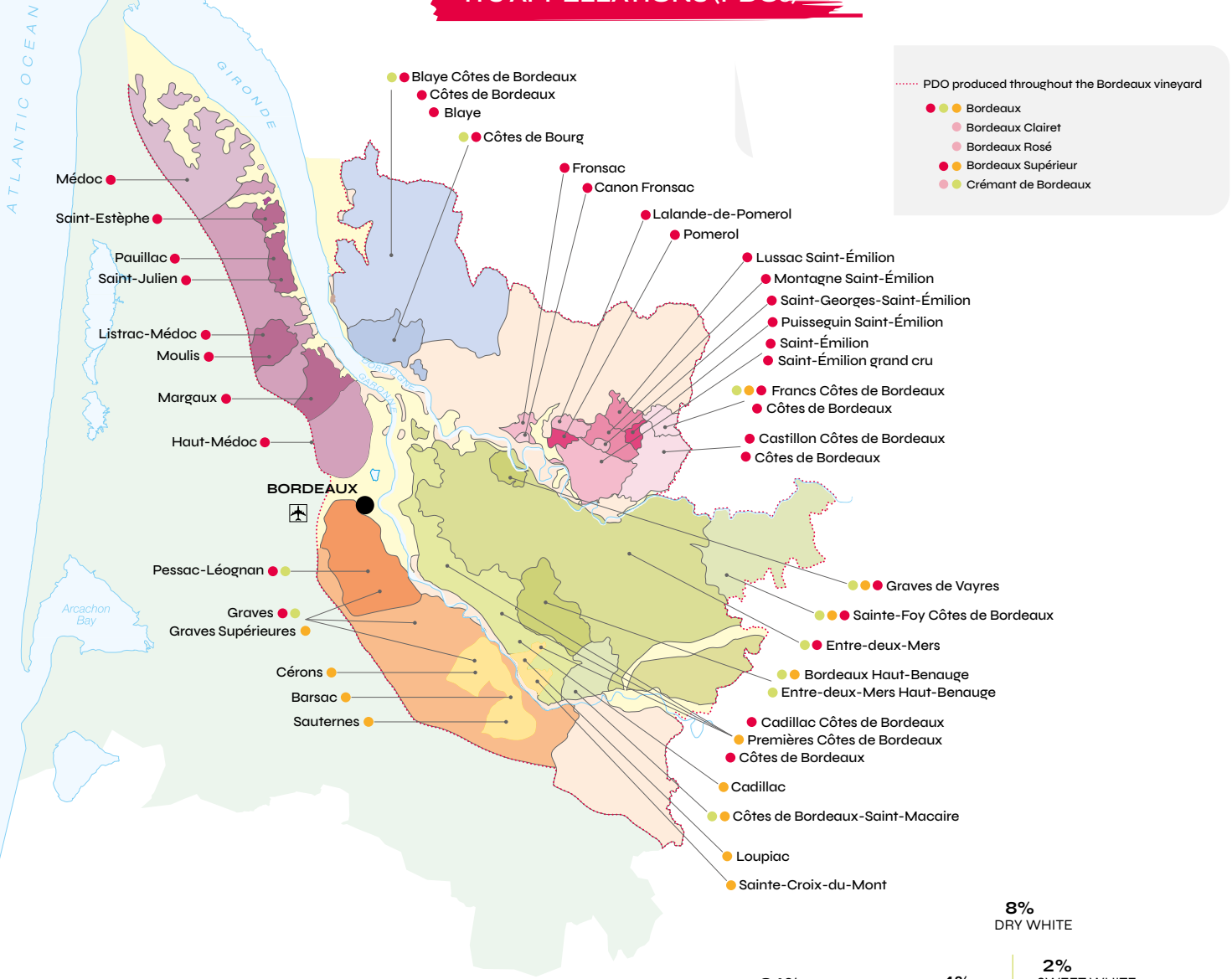


FRENCH PDO VINEYARDS - SURFACE AREA

Sources: Interprofessions 2022 & CIVB 2023

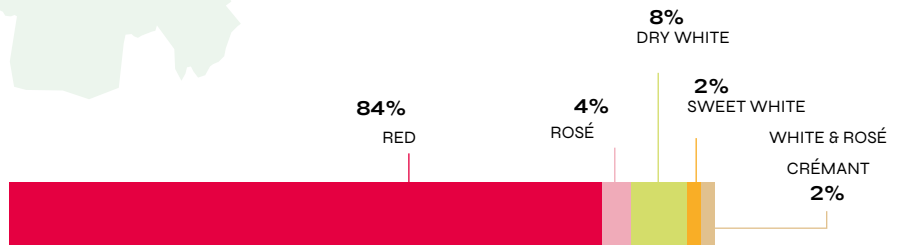


ITS APPELLATIONS (PDOs)



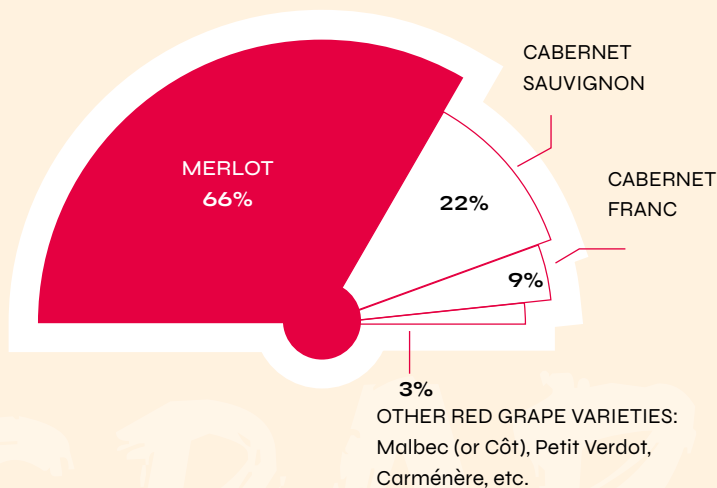
BREAKDOWN OF AREAS BY COLOUR IN 2023

Source: Customs



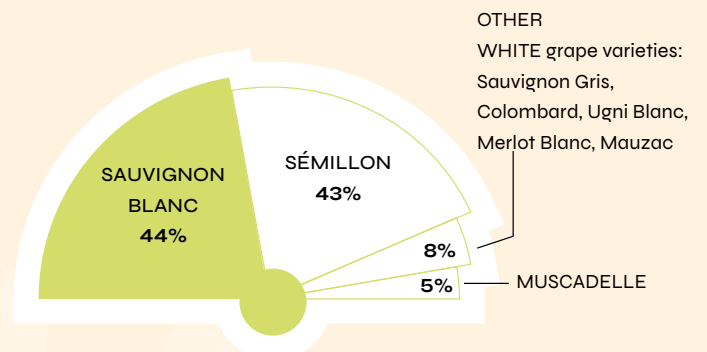
BREAKDOWN OF AREAS BY GRAPE VARIETY IN 2023

Source: Customs



ITS SIGNATURE GRAPE VARIETIES

Blended wines (mix of varieties) or single varietals. Red grape varieties account for the largest proportion of the vineyard (89%) compared with white grape varieties (11%). Bordeaux is the largest Merlot-producing vineyard in the world.

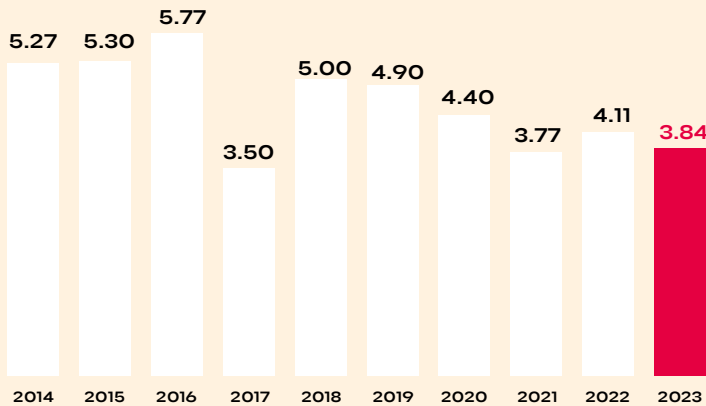


ITS PDO WINES IN ALL COLOURS

Each vintage brings a new challenge: the volume of the harvest depends on the weather conditions. While 4.6 million hectolitres are harvested on average each year (over the past 10 years), the 2023 vintage produced only 3.8 million hectolitres, or the equivalent of 500 million bottles.

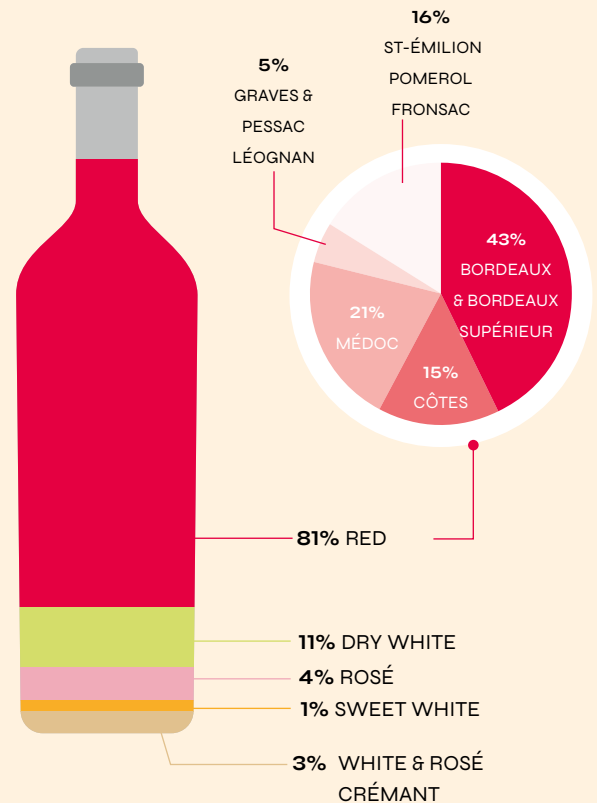
HISTORY OF BORDEAUX WINE HARVESTS (IN MILLION HECTOLITRES)

Source: Customs



BREAKDOWN OF PRODUCTION BY COLOUR IN 2023

Source: Customs



ITS SUSTAINABLE COMMITMENTS AND INITIATIVES

Sources: *Carbone 4 - Bilan Carbone 2019, **Agence Bio

SOCIAL

Helping to make the sector attractive by working to better understand the needs of employees in order to retain them and attract new talent, taking greater account of the arduous nature of jobs and training workers, and improving local employment dynamics.

CSR (Corporate Social Responsibility)

82 companies certified in 2023 as part of the collective Bordeaux Sustainable Impact approach, and a hundred more signed up.

CARBON FOOTPRINT

The 3rd carbon audit of the sector carried out in 2019* recorded 587,000 tCO₂e, i.e. a 39% reduction in emissions between 2007 and 2019.

Aligned with the French National Low-Carbon Strategy and the Paris Agreement, the Bordeaux wine sector is committed to a 54% reduction in emissions by 2030 compared with 2007. The Bordeaux wines 2030 Carbon Plan is based on 5 priorities:

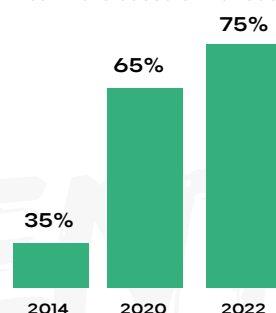
- Glass and packaging
- Viticultural practices (fuel oil, machinery, inputs)
- Freight
- Energy efficiency of buildings and processes
- Capture, storage and utilisation of CO₂

ENVIRONMENT

- Bordeaux brings together a diverse range of properties and production and protection methods. Within this diversity, the best-known environmental labels exist side by side. Some properties have several.
- Today, more than 75% of the Bordeaux vineyard area is certified under an environmental initiative (vs 35% in 2014).
- Nearly 1/4 of the vineyard area is farmed organically (AB) // +3 in 5 years and +3.5% by area between 2021 and 2022**

GROWTH OF CERTIFICATION IN THE BORDEAUX VINEYARD

CIVB estimate based on various sources



COMMITMENTS

ITS SALES

* Sales campaign 01/08/2022 - 31/07/2023 France + export.

Sources: Customs - CIVB

3.8 million hectolitres i.e. the equivalent of 500 million bottles sold in 2022 - 2023* at a value of nearly €4 billion.

SALES

IN FRANCE

NO. 1 DESTINATION 2023 SALES REPORT

CIVB estimate based on various sources

45%

in large retail

- Bordeaux remains the No. 1 PDO wine region sold in this channel.
- Bordeaux appellations represent 24% of volume sold and 25% of turnover.
- The average price of a bottle of Bordeaux wine in large retail in 2023 was €6.16:
- Bordeaux wine sales by colour: 84% red, 10% white and 6% rosé.

44%

On-trade (restaurants, wine shops, direct sales, etc.)

11%

Hard discount

BREAKDOWN BY VOLUME

Sources: Customs - CIVB

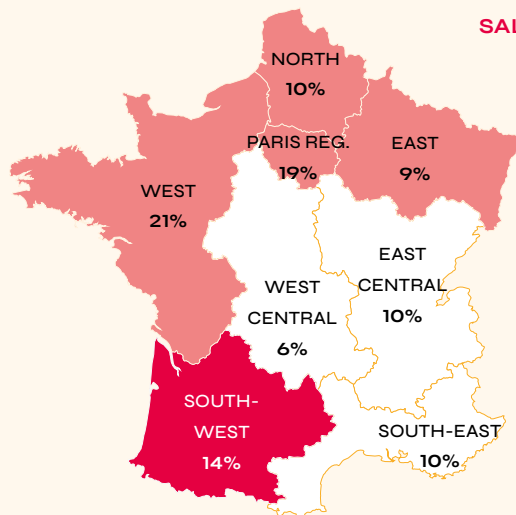


16

bottles of Bordeaux wine sold every second around the world

BREAKDOWN OF BORDEAUX WINE SALES BY REGION IN 2023

Source: Kantar -Worldpanel



REGIONAL CONSUMPTION INDICES

- 115 AND OVER ●
- 100 TO 114 ●
- 85 TO 99 ●
- UNDER 85 ○

SALES

ON EXPORT MARKETS



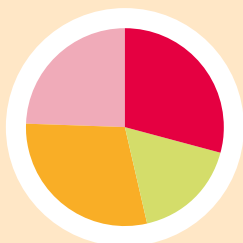
2.23
billion euros



208
million bottles

EXPORTS OF BORDEAUX WINES

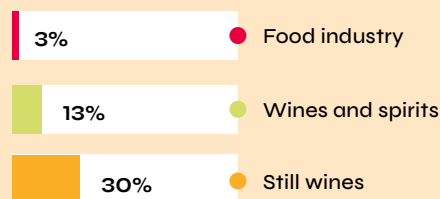
Source: Customs 2023



- 29% EUROPEAN UNION
- 17% AMERICAS
- 29% ASIA
- 24% OTHER DESTINATIONS

BORDEAUX WINES IN 2023 FRENCH EXPORTS

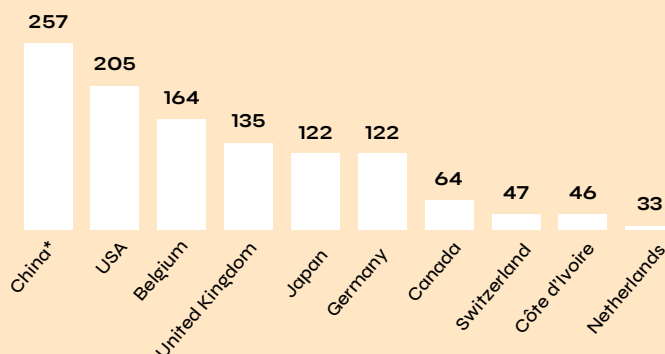
Source: Customs



- No. 1 French exporter of still PDO wines in volume and in value
- 96% by volume and 98% by value of wine exports for the Nouvelle-Aquitaine region

RANKING OF THE MAIN DESTINATIONS IN 2023 BY VOLUME (in thousand hectolitres)

Source: Customs



* Mainland China + Hong Kong + Macau